

Green Power Marketing Abroad

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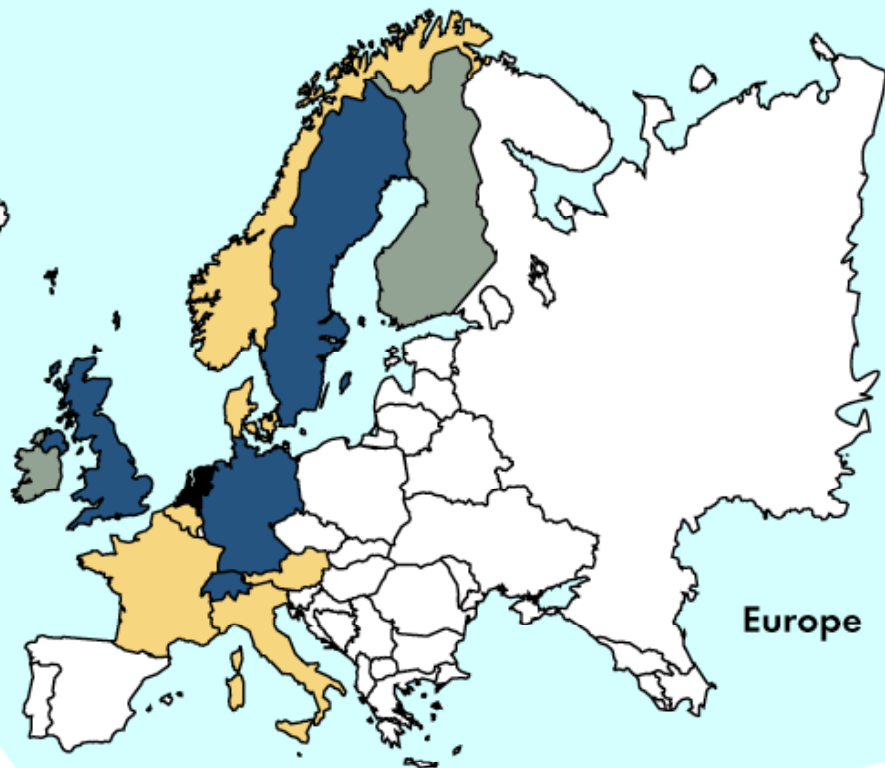


International Green Power Marketing Study

- Reviewed green power marketing activity in 16 countries (April 2002 report)
- Found that:
 - About 2 million customers worldwide are purchasing green power
 - About 500 marketers/utilities are offering green power options
 - 1000 MW or more of new renewable capacity has been installed to serve green power customers



Australia



Europe



North America



Japan



Key Findings

- Market penetration rates are typically about 1%, with the most successful markets achieving rates of between 5% and 15%
- Education and aggressive marketing is necessary
- Marketers generally offer a range of products to appeal to price sensitivities and preferences
- New renewables development has been limited
- Price is not the only important driver of demand, but lower-priced products are popular

More Key Findings

- Retail competition can stimulate marketing activity
- Customers often purchase green power without switching suppliers
- Certification and labeling programs can be important in shaping products (e.g., new)
- Government support can be an important facilitator of green power markets
- Impact of purchase obligations and similar policies is unclear